

# Quick Guide for New Qualtrics Users



Steps to Get Started	How To
<b>Login to Qualtrics &amp; set a new password</b>	<ul style="list-style-type: none"> <li>- If it is your first time logging in, you will need to set a password. Use the email link from Qualtrics to create your new password. Your login is your full Macalester email address.</li> <li>- If it is not your first time logging in, go to <a href="http://www.qualtrics.com">www.qualtrics.com</a> and enter your login credentials.</li> </ul>
<b>Create a new survey</b>	<ul style="list-style-type: none"> <li>- To get started, click the green button at the top right which says <b>+Create Project</b>.</li> <li>- You can create a simple survey from scratch by selecting <b>Blank Survey Project</b>.</li> <li>- Be sure to name your survey something clear and descriptive. Designate a folder if desired.</li> <li>- Click <b>Create Project</b>.</li> </ul>
<b>Add and Modify questions</b>	<ul style="list-style-type: none"> <li>- Click the green button toward the bottom which says <b>+ Create a New Question</b>.</li> <li>- Multiple Choice is the default question type, but you can change this using the green button on the right-hand toolbar under <b>Change Question Type</b>.</li> <li>- To add a new survey "page," click <b>Add Page Break</b> on the right hand toolbar, under "Actions."</li> <li>- Changes will automatically be saved. <b>CTRL+Z</b> will undo any changes you've made.</li> </ul>
<b>Handy question options (advanced)</b>	<ul style="list-style-type: none"> <li>- If you want to require that participants answer a particular question, you can designate a question as a <b>Forced Response</b>, under <b>Validation Options</b> on the right hand toolbar. However, be mindful of the ethical implications of forcing certain responses.</li> <li>- If you want to show different follow-up questions based on a participant's response (e.g., Biology majors get asked a different set of questions than English majors), explore <b>Add Display Logic</b>.</li> </ul>
<b>Preview your survey</b>	<ul style="list-style-type: none"> <li>- To experience the survey as your respondent would, click the blue <b>Preview Survey</b> tab, top right.</li> <li>- As you are modifying questions and adding pages, it is helpful to preview the survey frequently.</li> <li>- To change the colors, font size, and design features of the survey, explore the <b>Look &amp; Feel</b> tab.</li> </ul>
<b>Activate &amp; Distribute your survey</b>	<ul style="list-style-type: none"> <li>- When your survey is complete, click on the <b>Distributions</b> tab at the top left.</li> <li>- You have multiple distribution options. The simplest way to create an anonymous link that can be copied and pasted into emails or webpages is to click <b>Web</b>, then <b>Use Anonymous Link</b>.</li> <li>- You can also email your survey directly through Qualtrics, under <b>Distributions</b>, then <b>Emails</b>.</li> <li>- Once you schedule the email distribution, it will be saved under <b>Distributions</b>, then <b>Emails</b>. From here, you can also <b>+Schedule Reminder</b> for non-respondents or <b>+Schedule Thank You Message</b>.</li> <li>- If you have names and emails in an Excel file, you can upload them through <b>Contacts</b> then <b>+Create Contact List</b>. Be sure the top row of the file has column headers (e.g. "Email"), and <i>Save As</i> a .csv.</li> </ul>
<b>View, Analyze, and Download your results</b>	<p>Below are some initial options for view results within Qualtrics:</p> <ul style="list-style-type: none"> <li>- To quickly view <u>individual responses</u>, click <b>Data &amp; Analysis -&gt; Data</b>. You can see individual responses on the screen, or you can download by <b>selecting a participant -&gt; Actions-&gt; Export to PDF</b>.</li> </ul>

	<p>- To view <u>summary results for all/select questions</u>, click <b>Reports -&gt; Results</b>. Qualtrics will automatically graph and analyze the results of each question. You can customize graphs/charts by clicking on them and using the right hand toolbar. You can export as images under <b>Page Options</b>.</p> <p>- To <u>download graphs and tables for all/select questions</u>, you have two options:</p> <ol style="list-style-type: none"> <li>1. Click the <b>Share Reports</b> button and choose your preferred format (e.g., Word, PPT)</li> <li>2. Click <b>Reports -&gt; +Create New Report</b>. Here you can design your report within Qualtrics, much like a Word document, by adding headings, images, text, question wording, graphs, and statistics.</li> </ol> <p>- To <u>download data to Excel or SPSS</u>, click <b>Data &amp; Analysis -&gt; Data -&gt; Export &amp; Import -&gt; Export Data -&gt; Download Data Table</b>. Then choose your file format (CSV opens in Excel).</p>
<p><b>Close, Re-Activate, Share, or Delete your survey.</b></p> <p><b>Manage Folders</b></p>	<p>Most survey management features will be found on the <b>Projects</b> main page by clicking on the dropdown arrow on the far right of a project. You can manage <b>Folders</b> here, too: just drag a survey between folders.</p> <p>- To close an active survey, click <b>Close</b> on the dropdown menu. This does not delete the survey, it only closes it to new responses.</p> <p>- To re-open a closed survey, click <b>Activate</b> on the dropdown menu.</p> <p>- To delete a survey project, click <b>Delete Project</b> on the dropdown menu.</p> <p>- To share a survey, click <b>Share Project</b> on the dropdown menu. Enter the email address <i>of the Qualtrics user</i> with whom you'd like to share access. You can control viewing and editing rights here.</p>
<p><b>Protecting your data</b></p>	<p>- The Survey Coordinating Committee recommends downloading and saving all data to the G\drive for permanent storage. Please delete data from Qualtrics once it is finalized and downloaded: <b>Data &amp; Analysis -&gt; Tools -&gt; Delete</b></p> <p>- Always be mindful of who has access to your data, especially for data that may include identifying information. Shared accounts, especially in offices with rotating students/staff, need precautions.</p> <p>- NEVER include identifying information in reports unless you have explicit consent to do so from your respondents.</p>